

# Transfer a Trust

## Secure your Trust's Legacy



### A sustainable future for your trust's legacy

For many committees, there comes a natural turning point. Some organisations continue for many years. Others reach a stage where trustees are retiring, administration is becoming more complex, or the group feels it has achieved what it set out to do.

When that time comes, it is important to think carefully about what happens to the funds and the purpose you have worked hard to build.

If trustees are considering winding up a society or trust due to the ongoing administration being overwhelming, complex, or expensive, there are options available to ensure the purpose and funding of the cause continues.

### A practical option for local societies and charities

At the Top of the South Community Foundation, we work alongside many incorporated societies and charitable trusts across our region. These are the clubs, charities, and community groups that provide essential services, run local activities, and bring people together.

Over time, running a trust or society can become more demanding. There are legal responsibilities, reporting requirements, and the ongoing need to recruit new trustees or committee members. For some organisations, a trust transfer provides a simple and practical way forward.

### What is a Trust Transfer?

A trust transfer allows a society or charitable trust to wind up its existing structure while keeping its name, purpose, and story alive. Your remaining funds are transferred into a Named Fund with the Top of the South Community Foundation.

Your fund is invested alongside others in a low-cost structure, benefiting from scale and efficiency. We take care of the investment, administration, compliance, and grantmaking, so your mission can continue supporting the community year after year.

### How a Trust Transfer works

#### Establish a Named Fund

Your organisation creates a dedicated fund within the Foundation

#### Define your purpose

You set the goals for the fund so they reflect your original mission

#### Permanent funding stream

Grants are distributed each year to the causes you care about, while the capital continues to grow.

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**Top of the South**  
COMMUNITY FOUNDATION  
*Tē Tauīhu*

# Securing a vibrant future for our region

**Your legacy, our governance, forever.**



## **A real local example - Employment Support Marlborough**

In April 2024, Employment Support Marlborough transferred their remaining funds into a Named Fund with Top of the South Community Foundation before winding up. This ensured their mission could continue long after the trustees retired, and that the funds they worked hard to raise would stay in the region for their intended purpose.

“When our trustees decided it was time to retire, we wanted to make sure the funds we worked so hard to raise stayed in Marlborough. The team at Top of the South Community Foundation made the whole process seamless. It’s a relief to know our legacy is in such good hands.” - Frances Jessep, Former Trustee

## **What is a Community Foundation?**

Community Foundations are local, independent, and not-for-profit. They follow a well-established model of giving that has grown worldwide for more than 100 years and is now present in 18 regions across New Zealand.

Community Foundations build long-term, reliable funding streams for their local communities by investing donations and distributing the income as grants over time.

## **Top of the South Community Foundation**

Entrust your legacy to Top of the South Community Foundation, and we will ensure your generosity continues to reach the heart of our community, year after year. The Top of the South Community Foundation exists to strengthen the long-term wellbeing of Te Taihū by ensuring generosity given here continues to serve the community for generations.

We partner with generous donors who want to give back to the place and people that they care about most. We take care to ensure every donation is respected, protected, and carried forward with care and integrity.

As a place-based foundation, we have deep local knowledge of the charities and community organisations working across Te Taihū. We understand local needs and priorities, and we support donors to give in ways that feel meaningful to them, whether they have a clear focus or would value guidance.

Donations to Top of the South Community Foundation are invested, and the income from those investments is distributed year after year as grants to local charities and community organisations. In this way, generosity continues to strengthen community wellbeing across Te Taihū, forever.

**If your organisation is considering its next chapter, we’re here to help.  
Talk to us about how a trust transfer could work for you.**

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